Bernalillo County Performance Management

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Operations Excellence Office
Presentation at Colorado OpenGov User Group
9/24/19

Our Journey

- Bernalillo County
- Evolution of Performance Management
- Our Team
- Process Improvements
- Technology Leveraged
  - ✓OpenGov Dashboards
  - ✓Webpage Development
- Going Forward

Bernalillo County: Who we are

2600 employees

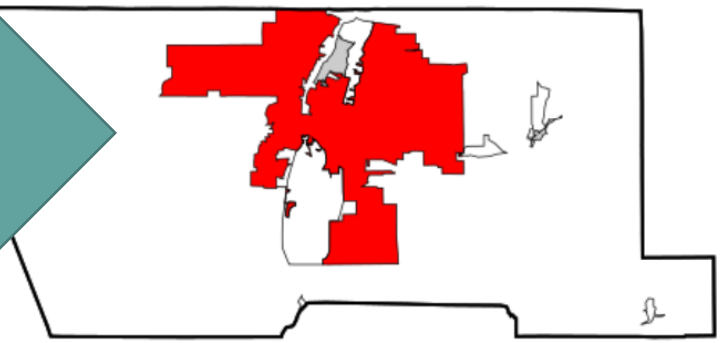
35 departments

650 million $ operating budget

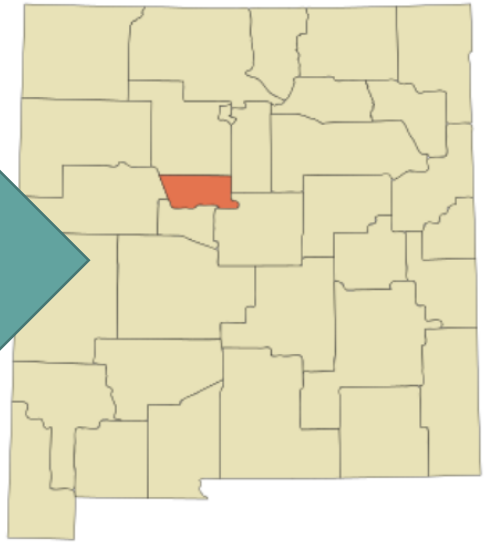
5 commissioners

5 elected officials

1160 square miles
Incorporates the **City of Albuquerque**



Located in central **New Mexico**



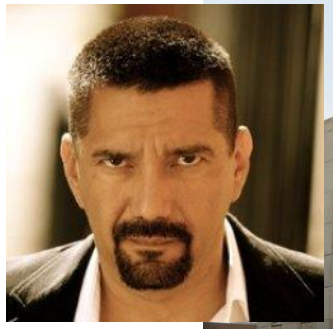
Bernalillo County: What we do & who we serve

Animal Care
Fire
Economic Development
Emergency Communication
Fleet & Facilities
Jail
Parks
Roads
Sheriffs
Technical Services
Zoning (Planning & Development)

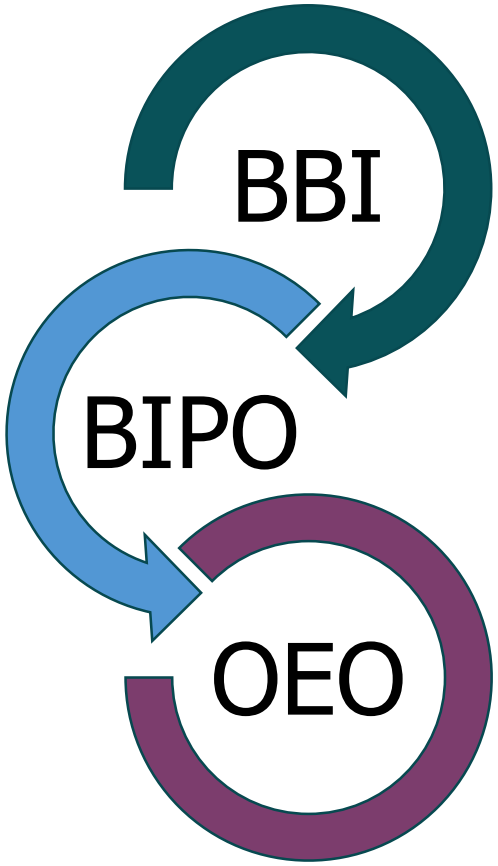
676k residents

111k residents living in **unincorporated areas** of the county

Bernalillo County: Fun Facts



Where we started



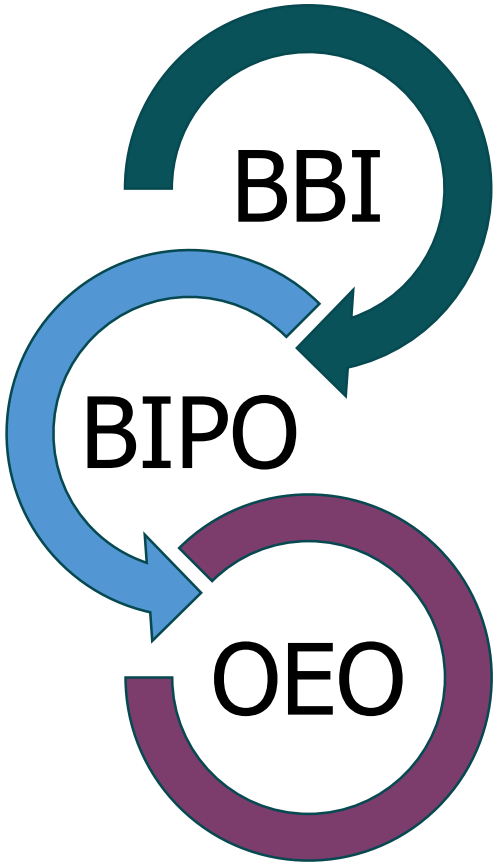
- Budget & Business Improvement (BBI)

Leverage technology (ERP)	Align Budget	Focus on user needs

- BI focused on managing ERP projects
  - Major system upgrades & new functionality
  - User adoption
  - Established own project management methodology
- And then…technology functions moved to IT
  - ERP moved back to IT & BI role changed

2012 to 2015

And then…



- Business Improvement & Performance Office (BIPO)
  - Business Improvement team (all 3 of us) shifted focus to:

Strategic Planning

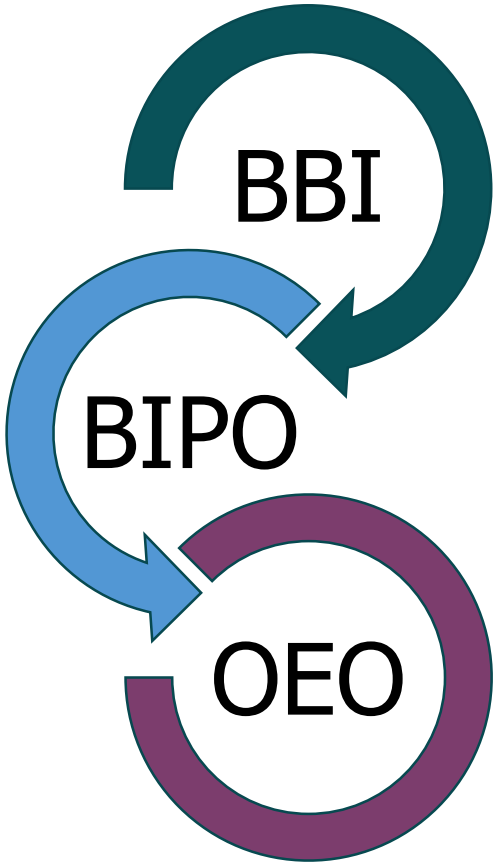
Performance Management

Business Improvement

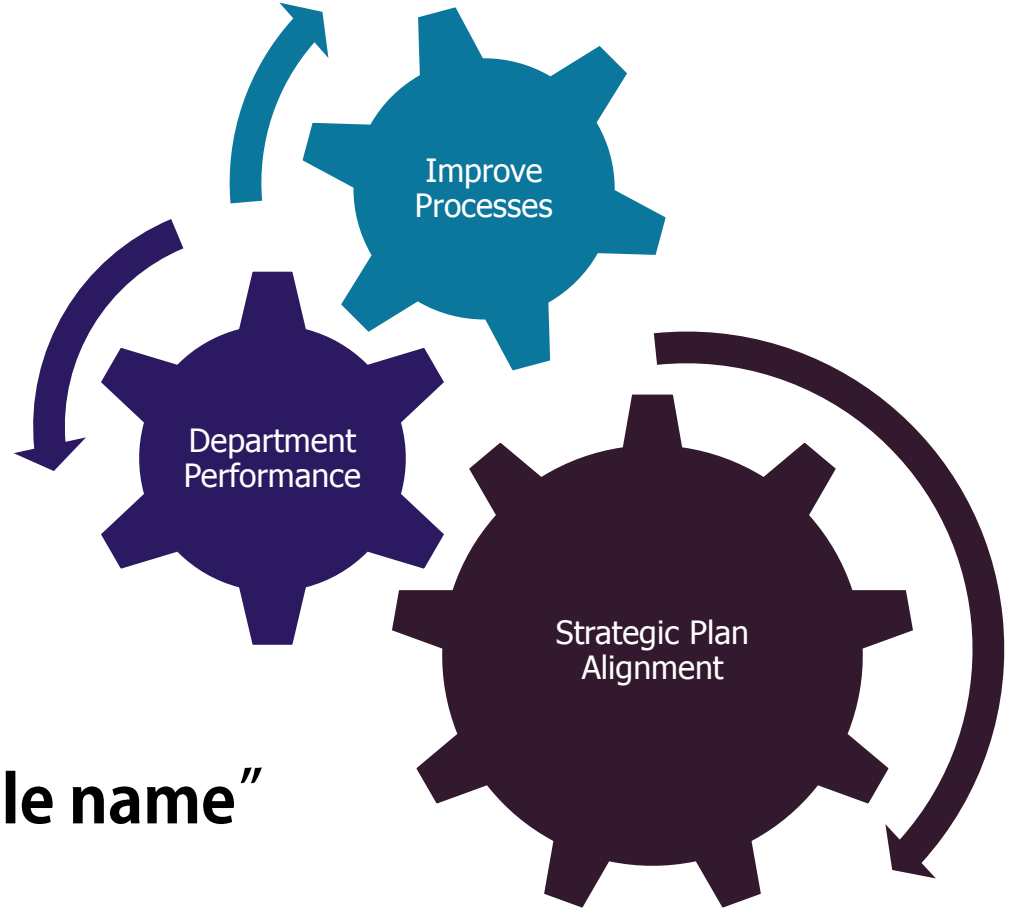
Late 2015 to early 2019

Where we are now

2019 CERTIFICATE OF EXCELLENCE in Performance Management ICMA



- Operations Excellence Office (OEO)



Early 2019 to present

"Excellence is our middle name"

Our Team

- Team consists of…

- **Manager** – lead projects & program, design processes
- **Analyst** – technical design & analysis, process development & improvement, end user training
- **Specialist** – data specialist, technical & process support

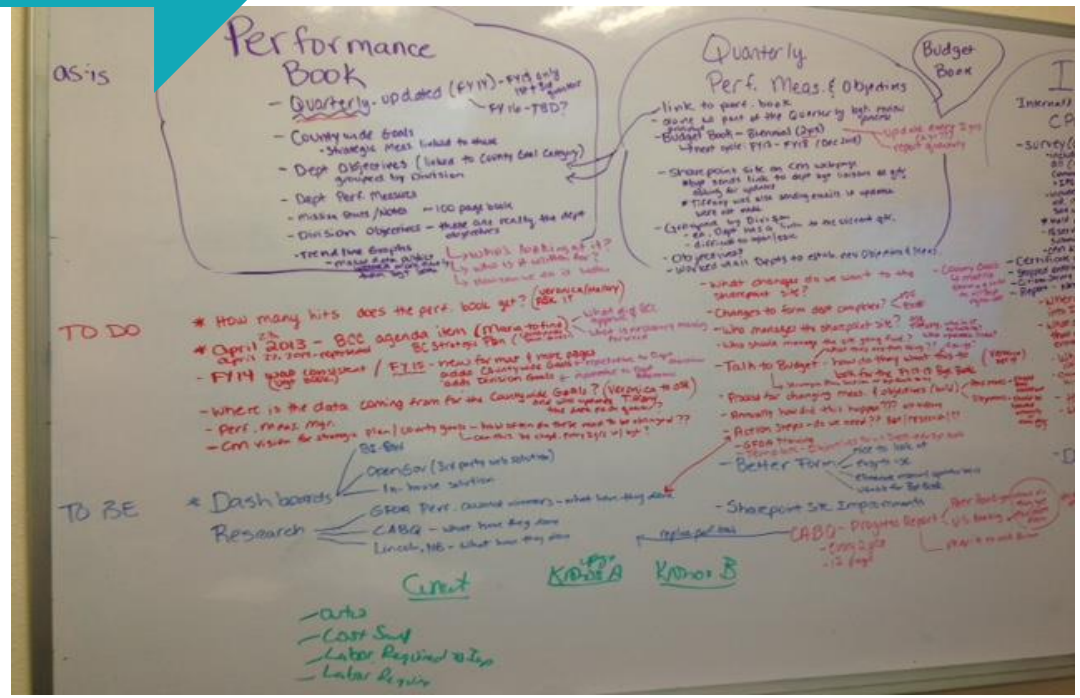
- **2 interns** – contingent upon funding, provide support to web pages & dashboards

When BIPO was created…

- Analyzed Performance Management at the county

As is → **To be**

- Looked at
  - What did we do in the past?
  - What did we **have** to do?
  - What did we **want** to do?



Improving Performance Management

- All decisions made using these guiding principles…

Do work that adds value to the organization

Only ask for data that will be used

Track the most important things

Make it to easy to use & easy to understand

6 Areas Analyzed

- PDF book
- Almost no hits
- Tables of data not understandable

1 Performance Book

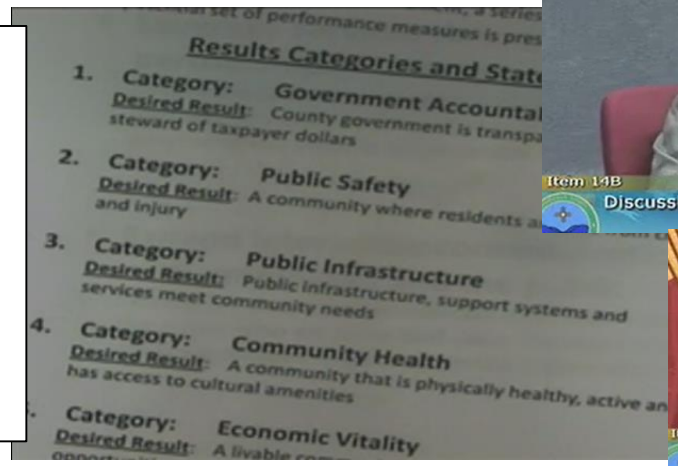
Performance Measures	Actuals Qtr. 1	Actuals Qtr. 2	Actuals Qtr. 3	Actuals Qtr. 4	YTD Actuals	2014 Target
New estates opened	199	193			199	500 EA
Pro Se filings	65.67%	69%			65.67%	60%
Total contacts	2,744	2,363			2,744	9,500 EA
Process electronic requests within 7 days	100%	100%			100%	95.0%
Outreach events per year	5	1			6	7 EA
People contacted through outreach events	230	8			230	250 EA

Need public to be involved…so far just a management plan

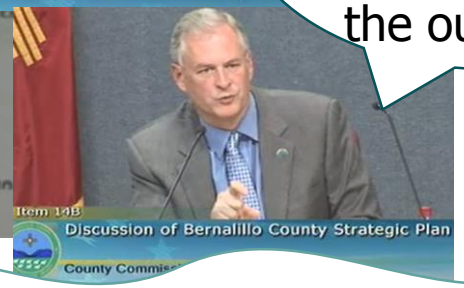
2 Strategic Plan

Bernalillo County Strategic Plan

- Mission Statement
- Strategies
- Results Statements
- Indicators
- Performance Measures



It would be helpful to have some examples of the outcomes



3 Budget Book

Performance Measures	2009 Actuals	2010 Target	2011 Target	2012
Square Footage Cleaned per employee	18,880.0 FT2	28,000.0 FT2	28,000.0 FT2	28,0
Quality Inspections p/employee p/month	2.0 EA	2.0 EA	2.0 EA	
Custodial Rqsts responded in 1 wrkg day	100.0 %	100%	98%	
Participate in Monthly Safety Meetings	N/A	N/A	12.0 EA	

- Tables of data
- Link to budget unclear
- Trends & link to strategic plan unclear

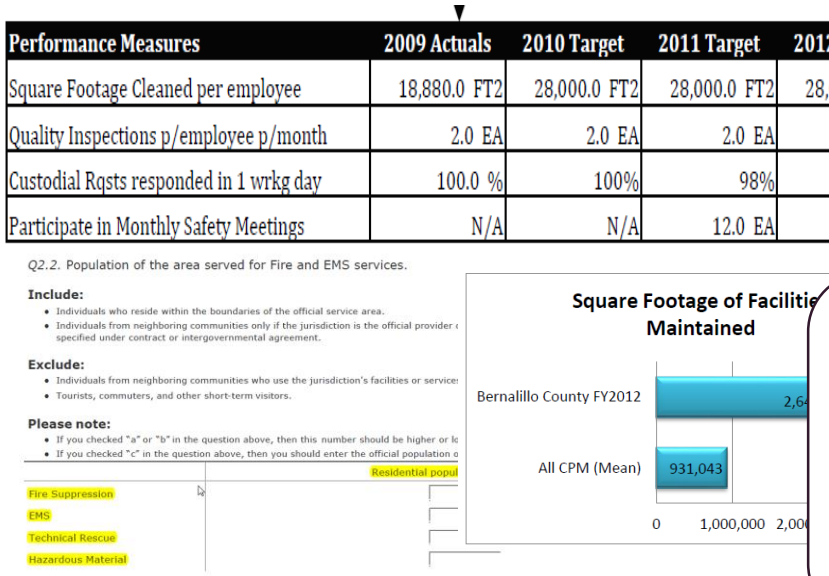
6 Areas Analyzed

4 Quarterly Reporting

Performance Measures	2009 Actuals	2010 Target	2011 Target	2012 Tar
Square Footage Cleaned per employee	18,880.0 FT2	28,000.0 FT2	28,000.0 FT2	28,000.(
Quality Inspections p/employee p/month	2.0 EA	2.0 EA	2.0 EA	2
Custodial Rqsts responded in 1 wrkg day	100.0 %	100%	98%	
Participate in Monthly Safety Meetings	N/A	N/A	12.0 EA	12

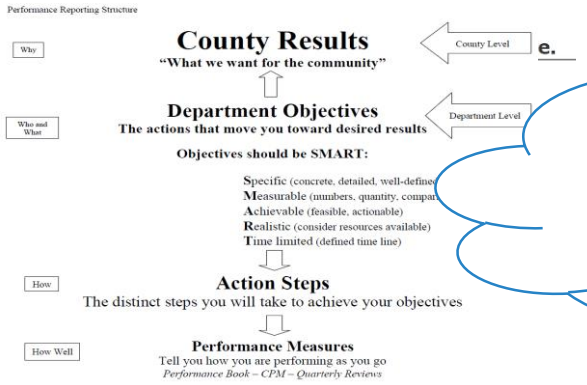
- Performance an afterthought in quarterly budget reviews
- Who's looking, so why bother?
- Inconsistent, difficult to use forms
- Process undefined

5 ICMA



- Extremely time consuming to enter data
- Comparison data difficult to find/use
- Benchmarks used as big stick
- Less than half of county services included

6 Training



- Not targeted to people who provide the data
- Forms difficult to use
- Process unclear

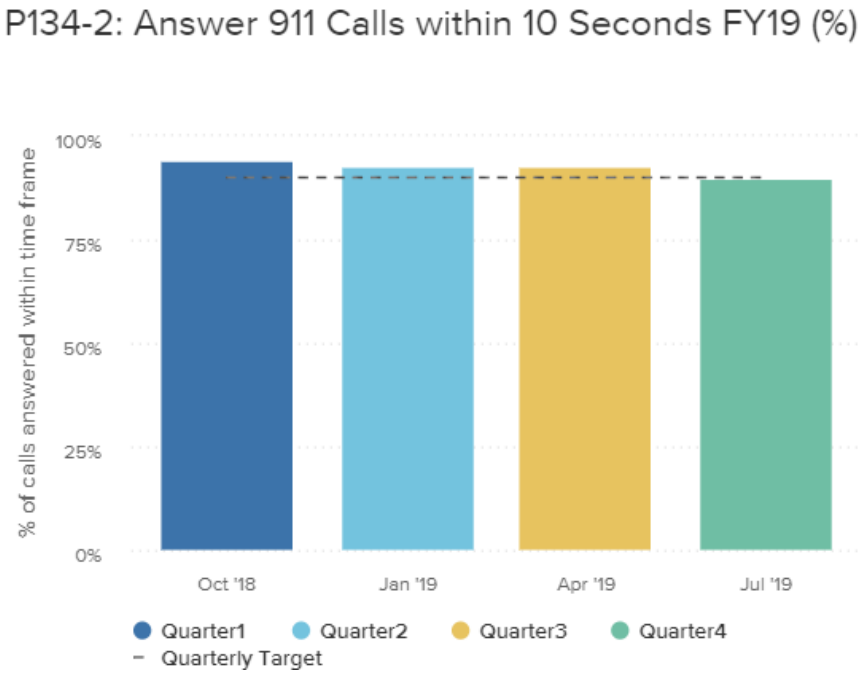
Result: Improve Process & Tools

Process

- Measure what matters!
- Ask departments…
  1. What does community want to know about dept.
  2. What does dept. want the community to know
  3. What does dept. want to learn about itself
- Transparency
- Accountability

Tools

- Dashboards!
  - Wanted interactive graphs that are easy to understand

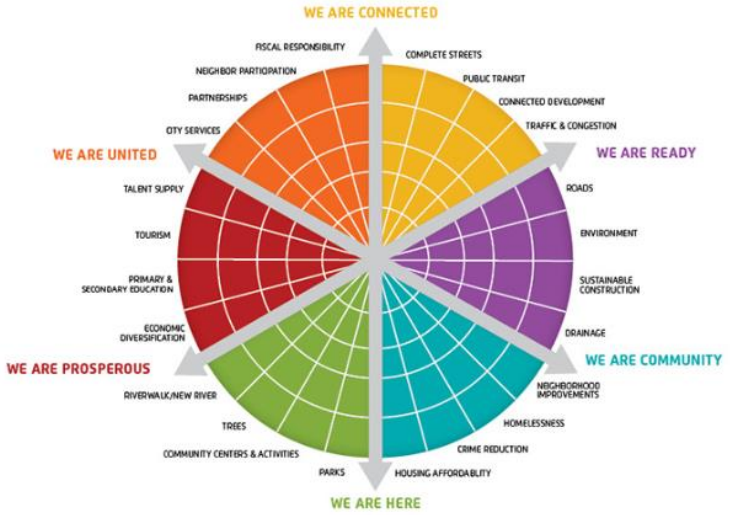


Research, research, research

- Find others already doing it well
  - What is their process?
  - Talk to them…ask them what worked for them & what didn't
  - Look at their websites
  - What tools are they using?

ARAPAHOE COUNTY
COLORADO'S FIRST

CITY OF SAN MATEO
CALIFORNIA



COUNTY OF SAN MATEO
CALIFORNIA

Department Performance
This dashboard is used to track the performance of all County departments and programs.

CITY OF FORT LAUDERDALE

IRVING
TEXAS

Researched Performance Systems

- Researched system agnostic tools
  - **BI, Information Builders, Socrata, OpenGov, Junar**
- Data for performance measures comes from everywhere
  - **SAP, Accela, NeoGov, Spreadsheets, etc.**
- Needed centralized system to gather & transparently report performance data
- Time spent entering gathering data needs to be worth the effort (output > input)

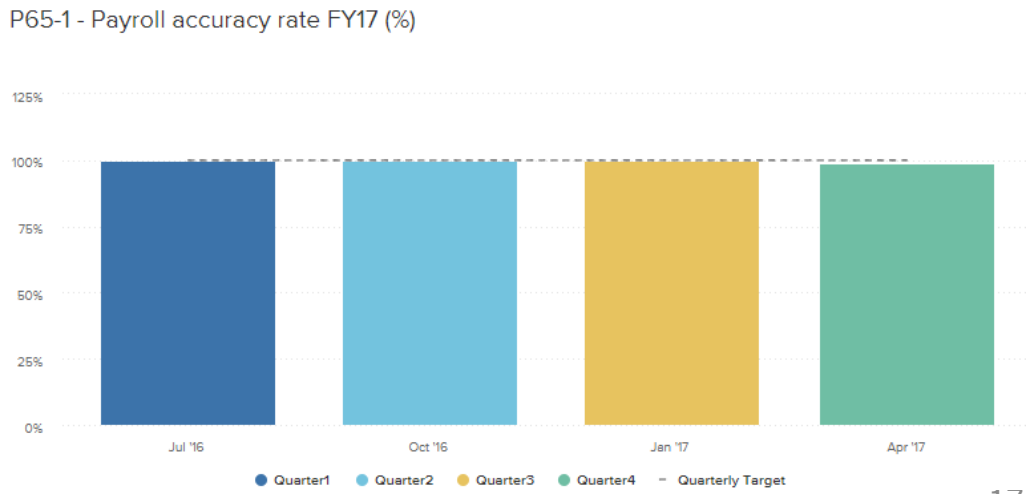
Dashboards needed to be…

- ✓Easy to use
- ✓Easy to understand
- ✓Interactive
- ✓Transparent

As Is

Performance Measures	Actuals Qtr. 1	Actuals Qtr. 2	Actuals Qtr. 3	Actuals Qtr. 4	YTD Actuals	2013 Target
Months closed within 30 days	3 EA	3	3	3	12	12 EA
Published financials by Dec 31	n/a in 1st qtr.	1	n/a in 3rd qtr.	n/a in 4th qtr.	1	1 EA
CAFR to State Auditor by Nov 15	n/a in 1st qtr.	1	n/a in 3rd qtr.	n/a in 4th qtr.	1	1 EA
GFOA Certificate Received	n/a in 1st qtr.	n/a in 2nd qtr.	n/a in 3rd qtr.	1	1	1 EA
Assets inventoried by end of year	n/a in 1st qtr.	40%	26%	34%	100%	100%
Audit Opinion is unqualified	n/a in 1st qtr.	1	n/a in 3rd qtr.	n/a in 4th qtr.	1	1 EA
Payroll Accuracy Rate	100%	100%	100%	100%	100%	100%
Transfer of statutory payment	1 EA	1	1	0	3	1 EA
Invoices paid by due date	98 %	97.8%	76%	92%	90%	100%
% Warrants that are accurate	98.7 %	99.1%	99.3%	98.8%	98.9%	100 %

To Be



Started Process to Procure System

- Built listing of functional requirements
- Analyzed costs
- Prepared RFP
- Secured funding….

- Cancelled RFP and project funding reverted

Focused on Improving the Process & Data

- No point in building dashboards if data not good or not tracking meaningful measures
- Went to **Plan B**: Gather & graph the data in Excel
  - Still wanted to greatly improve performance management process
  - Regular meetings to review with directors, deputy county managers
    - ✓Not just a checkbox exercise
    - ✓People are looking at this
    - ✓It's important
- AND THEN…..ICMA discontinued Performance Platform

Still needed a Replacement for ICMA Platform

- Found **OpenGov** – July 2016
- How we got it approved?
  - ➢Replacement for the ICMA Performance Platform
    - Didn't need IT analysis – system replacement & offered functionality that couldn't be built internally
  - ➢Cost effective
    - Didn't need to seek large budget as we were just coming off the budget crisis
  - ➢Public sector specific functionality
  - ➢Procurement – utilize GSA
- Contract approved in Sept 2016

OPENGOV

System Implementation

Late 2016

Phase I

- Financials

Phase IIA

- Comparisons – CivicDashboards

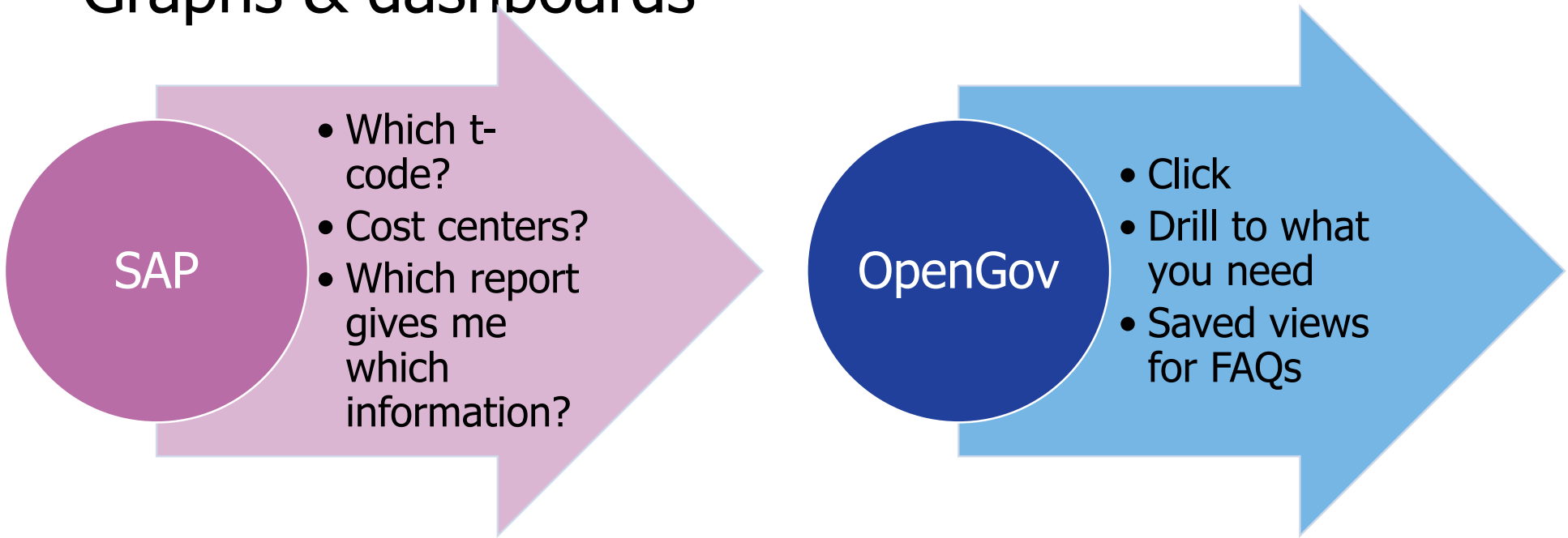
Phase IIB

- Performance Dashboards

Phase I: Financials

Late 2016-Early 2017

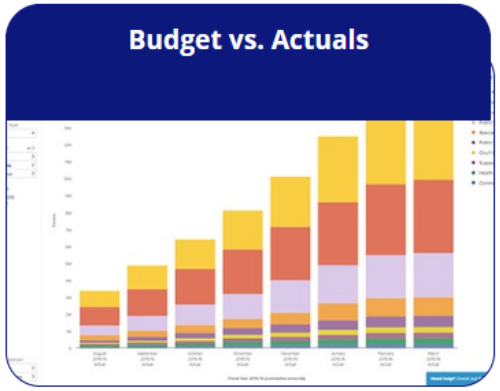
- OpenGov Intelligence
  - Load budget & actuals from SAP
  - Enhance transparency
  - Data more accessible, easy to use
  - Graphs & dashboards

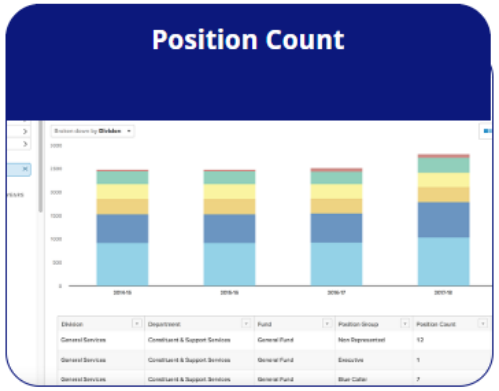


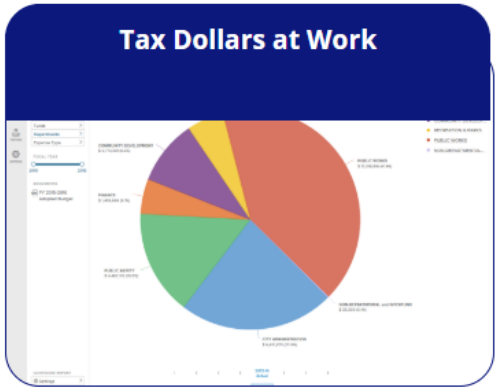
Transparency

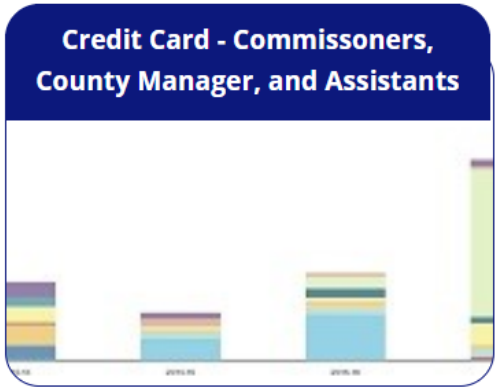
Late 2016-Early 2017

- Used OpenGov Intelligence to build transparent dashboards
  https://www.bernco.gov/finance/opengov-financials.aspx









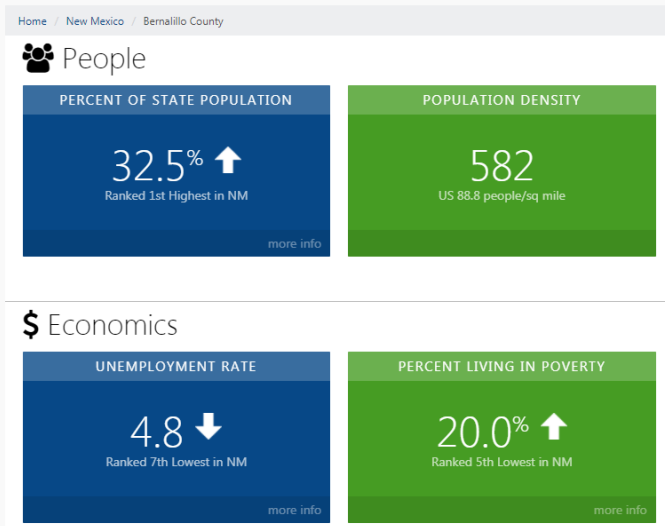
Phase IIA: Comparisons

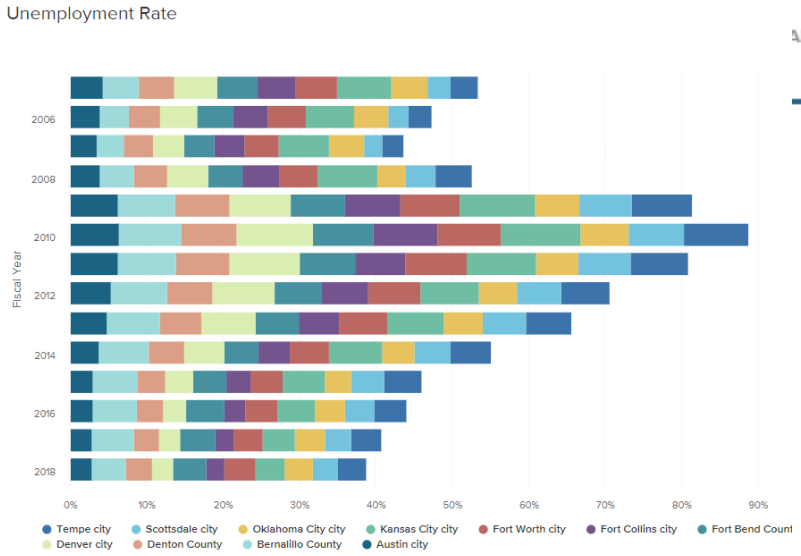
- CivicDashboards.com
  - Provides data for all municipalities on population, unemployment, income, crimes, housing, building permits, insurance, education
  - Easy side by side comparisons
  - Easy to build dashboards (with OpenGov)

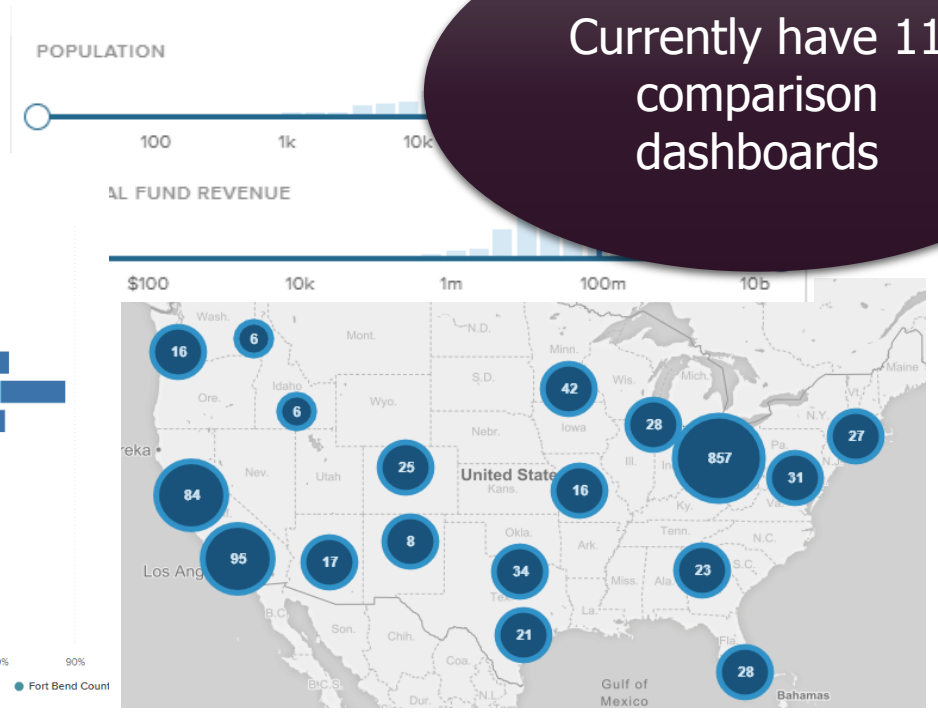
- OpenGov Network
  - Compare to other OpenGov customers based on population and revenues

Early 2017

Currently have 11 comparison dashboards







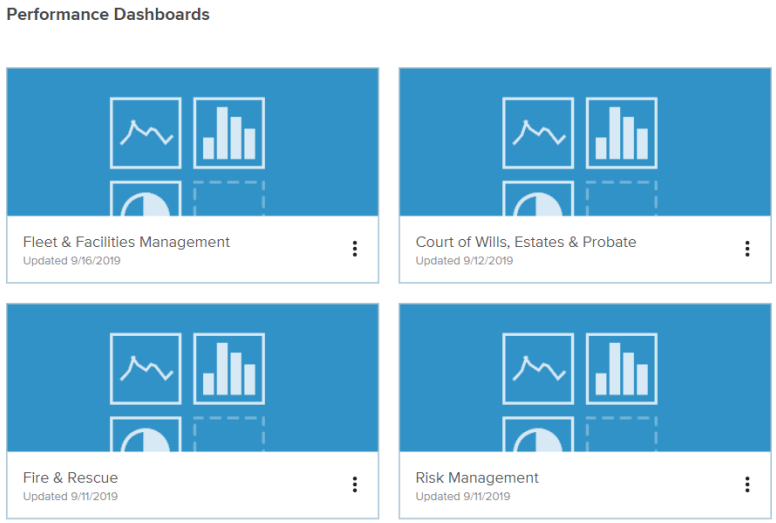
Phase IIB: Performance

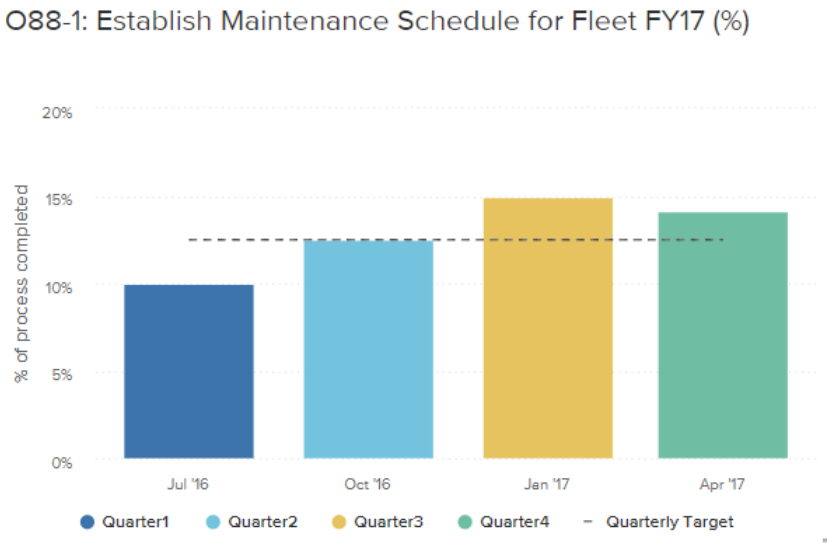
- OpenGov Open Data Platform
  - ➢Datasets from all systems
    - Download data to Excel, upload to Data P
    - Build templates for summary/non-system da
    - Machine readable
  - ➢Dashboard Builder
    - Built dashboard for each department

Piloted this rollout initially with 7 depts. & ~50 measures (Jan-Feb)

Early 2017

Then rolled out to all 35 depts. & over 300 measures by end of April



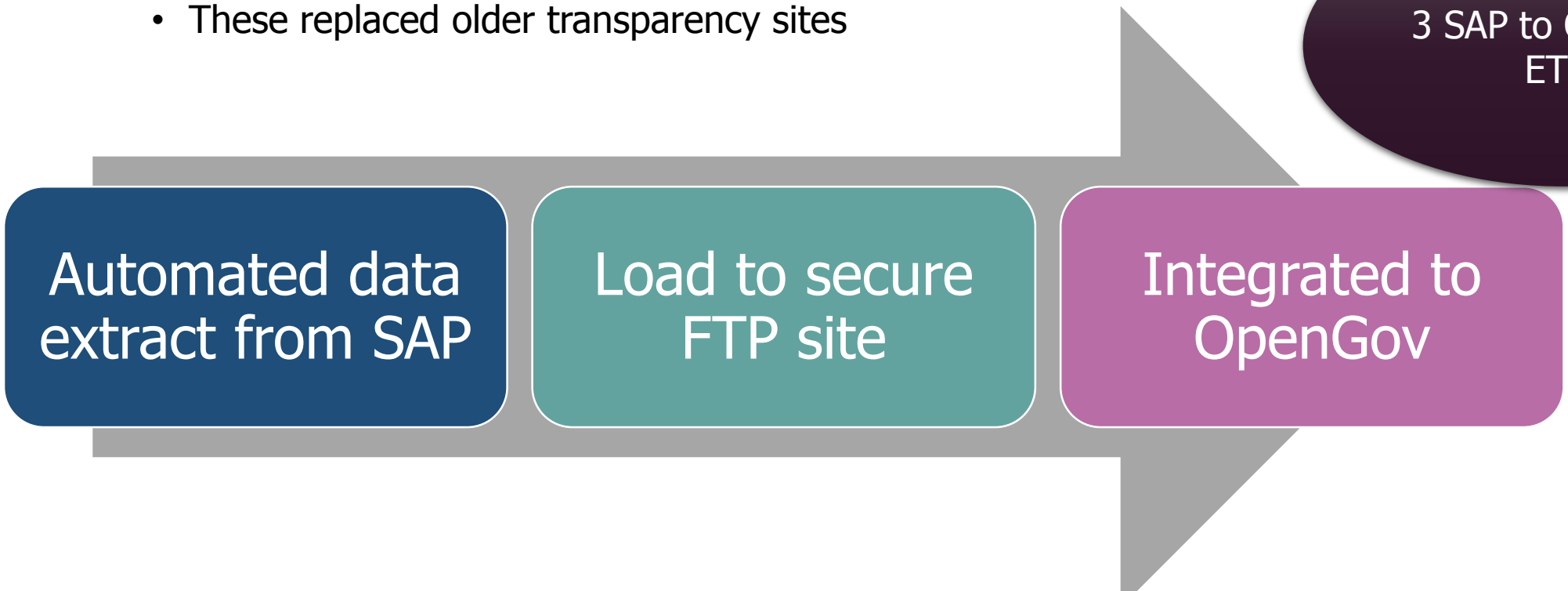


Phase IIB: Performance

- ERP Integration
  - Built interface from SAP to OpenGov for travel data to automate this process
  - Later added more ETL (Extract Transform Load) interfaces
    - Credit Card data
    - Checkbook Register
  - These replaced older transparency sites

Early 2017

3 SAP to OpenGov ETLs



Data…from ugh to aha!

- Piloted dashboard build out with 7 depts.
- Talked a lot about their data:
  - Where does it come from (system, other)?
  - How & what can be extracted?
  - Data upload templates created
    - Summary data
    - Detailed data
  - How are the measures calculated?

Data gathering process & conversations were difficult at the start…had a lot to learn about what data was available & had to build our own process

Early 2017

Dashboard design

Built out ~350 webpages 5 goals, 35 depts. & over 300 measures by end of April

Early 2017

- Dashboard design
  - Had lots of ideas of how we wanted these to look
  - Easy to understand…if you have to think too hard then not a good dashboard
- Lots of long meetings with OpenGov development team…
- OpenGov trained us to build and maintain
  - More technical than we really wanted it to be (SQL)
- Standardized graph types for each category of performance measure

What we wanted
vs
What is possible

Got better once we got here

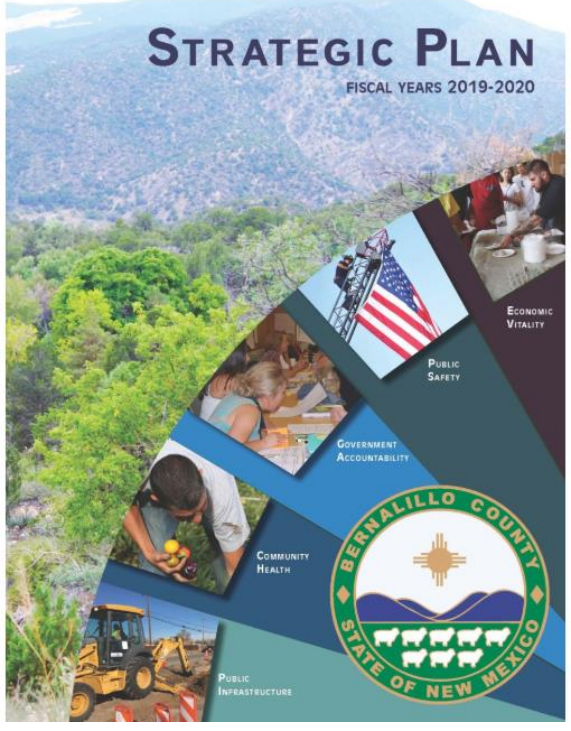
How to get to the dashboards?

Go-Live May 2017

- BERNCO VIEW – County's transparency site
  - ➢ Strategic Plan & Dept Performance web page

http://www.bernco.gov/finance/strategic-plan-and-department-performance.aspx

STRATEGIC PLAN & DEPARTMENT PERFORMANCE



- What is the Strategic Plan?
- What is the County's Mission?
- What are the Strategic Plan Goals
- What is a Performance Measure?
- What is an Objective?
- What are Business Strategies?
- How did we get here?
- Who to contact for questions?

Government Accountability

Transparent & accountable use of taxpayer dollars

Public Safety

Community where residents are safe from crime & injury

Economic Vitality

Thriving, livable community with diverse economic opportunities

Community Health

Healthy and active community with access to cultural amenities

Public Infrastructure

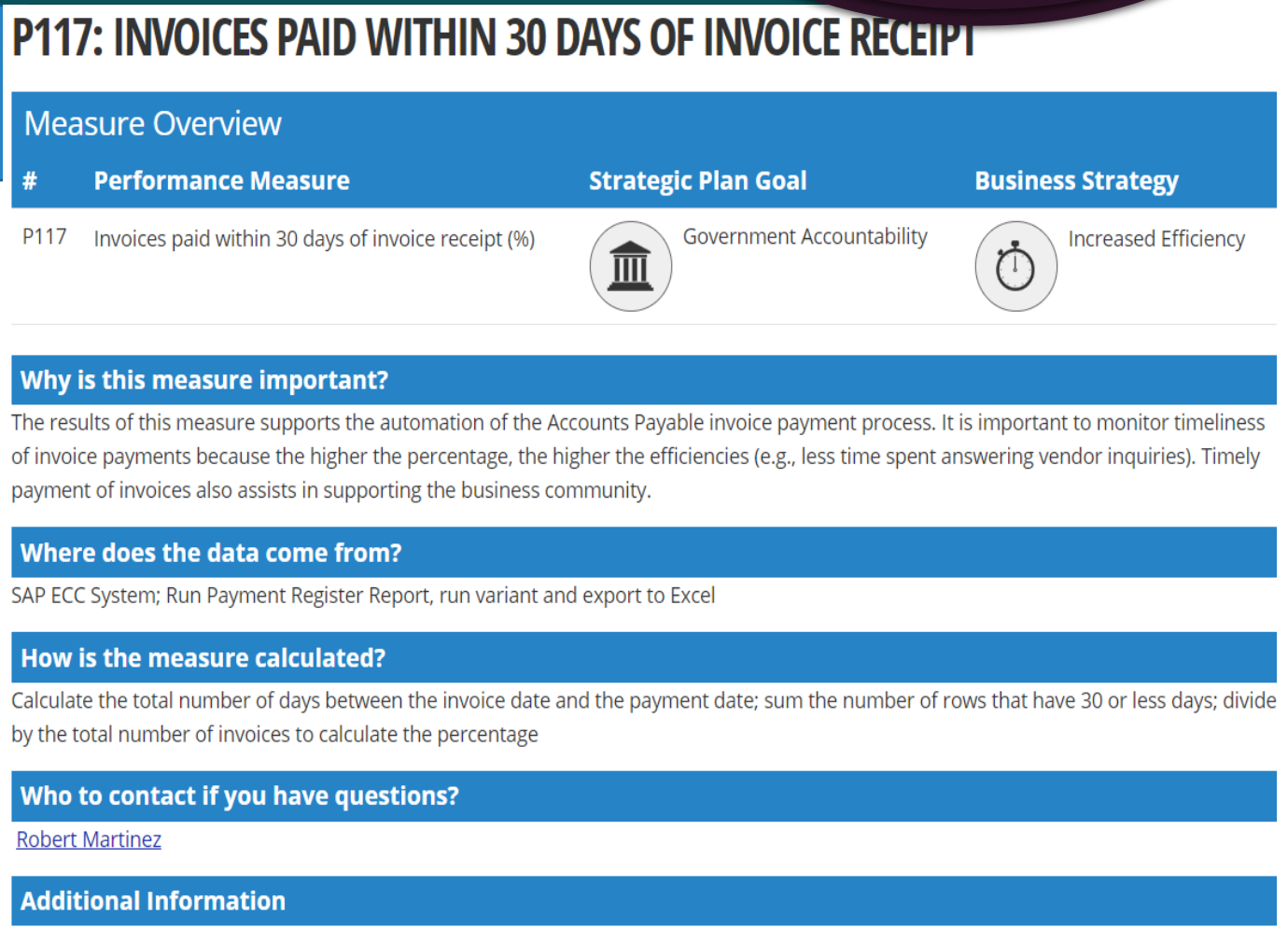
Meet community needs by supporting infrastructure owned by county or for public use (e.g. roadways, facilities, systems)

Design & Build Webpages

Built out ~350 webpages 5 goals, 35 depts. & over 300 measures by end of April

How to bring this all together?

- Webpages were built to make performance data accessible to public
- "Live, interactive" strategic plan
- Tell the story about each performance measure, not just dump data & graphs



P117: INVOICES PAID WITHIN 30 DAYS OF INVOICE RECEIPT

Measure Overview

#	Performance Measure	Strategic Plan Goal	Business Strategy
P117	Invoices paid within 30 days of invoice receipt (%)	Government Accountability	Increased Efficiency

Why is this measure important?

The results of this measure supports the automation of the Accounts Payable invoice payment process. It is important to monitor timeliness of invoice payments because the higher the percentage, the higher the efficiencies (e.g., less time spent answering vendor inquiries). Timely payment of invoices also assists in supporting the business community.

Where does the data come from?

SAP ECC System; Run Payment Register Report, run variant and export to Excel

How is the measure calculated?

Calculate the total number of days between the invoice date and the payment date; sum the number of rows that have 30 or less days; divide by the total number of invoices to calculate the percentage

Who to contact if you have questions?

Robert Martinez

Additional Information

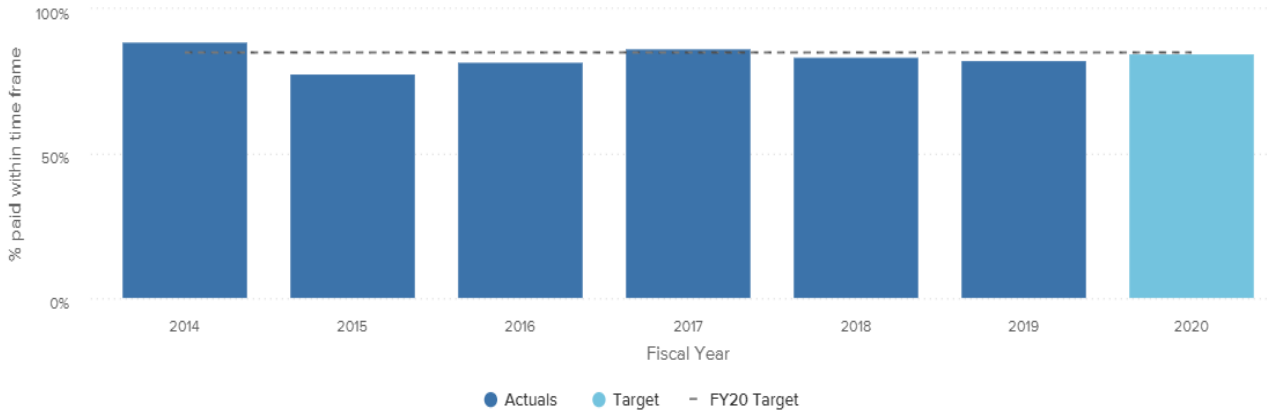
Embedded the OpenGov Graphs

We currently have ~1400 tiles in performance dashboards

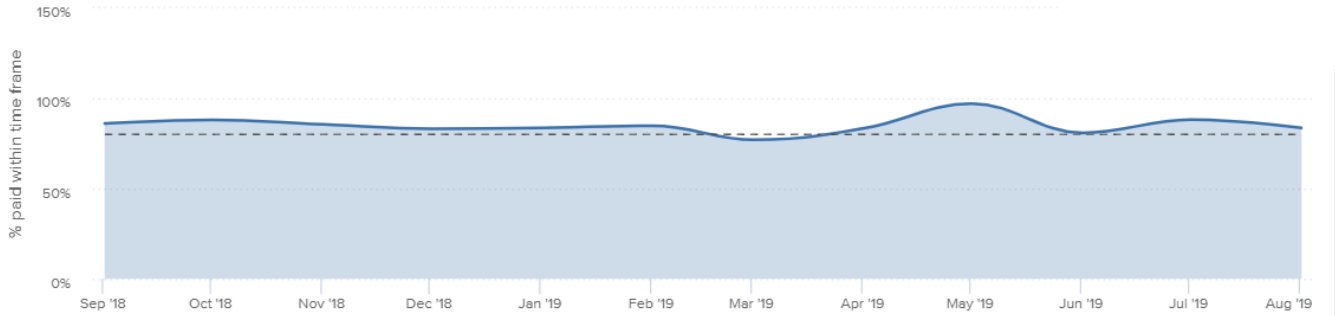
FY19 TARGET	FY20 TARGET	TREND ANALYSIS
83%	85%	
% paid within timeframe	% paid within timeframe	

P117: Invoices paid within 30 days of invoice receipt (%)			
Strategic Plan Goal:	Government Accountability	**Business Strategy:**	Increased Efficiency
Reporting Frequency:	Monthly	**Where Does the Data Come From?:**	SAP ECC System; Run Payment Regist export to Excel

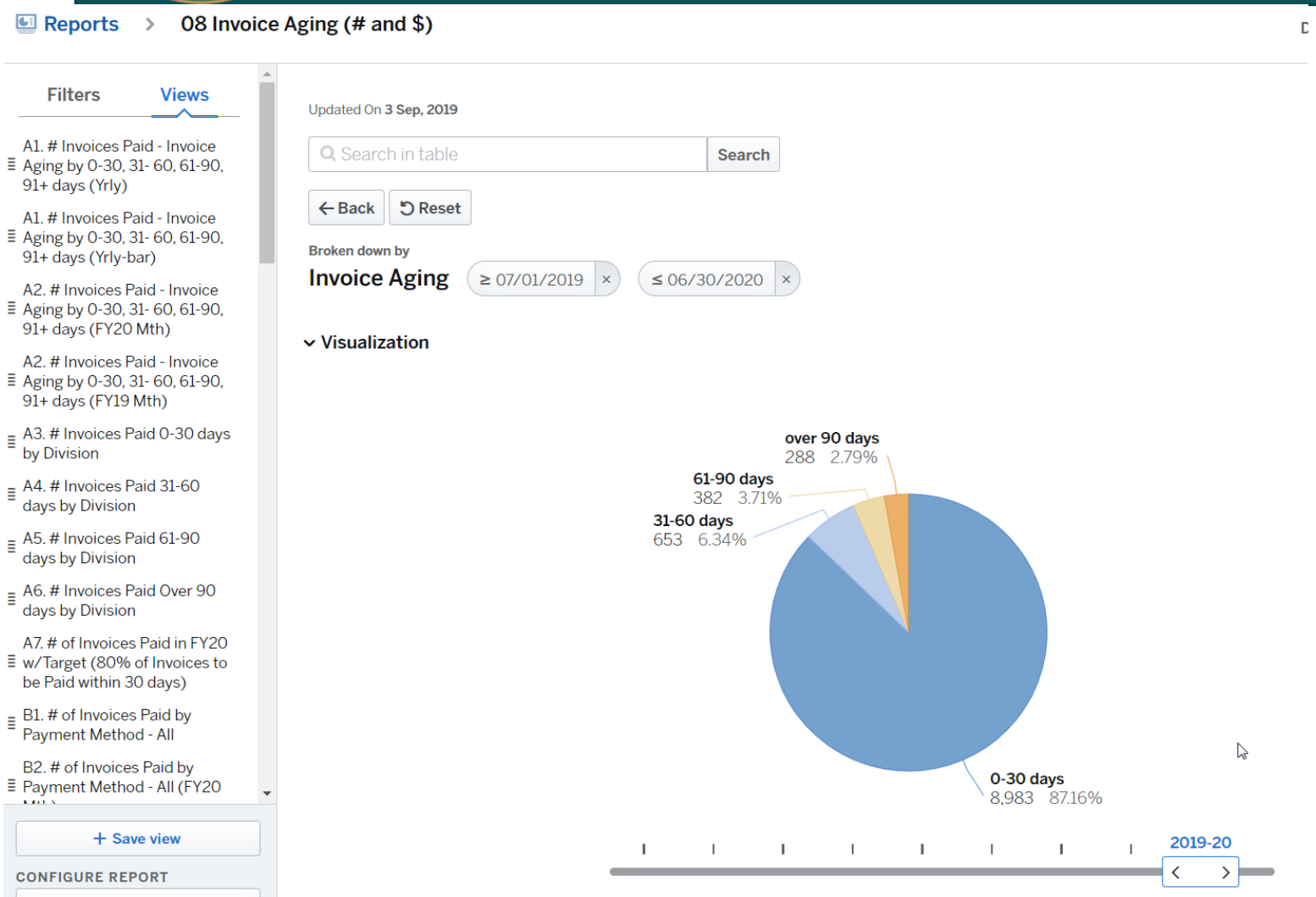
P117-History: Pay Invoices within 30 Days of Receipt (%)



P117-1: Pay Invoices within 30 Days of Receipt (%)



Built out detailed reports

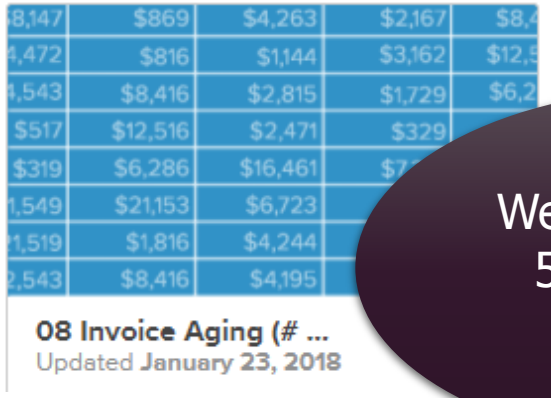


- Focused on operational data related to performance measures
- Can we get the data from the system?
- How can it help the department to have visibility to information related to performance measures?

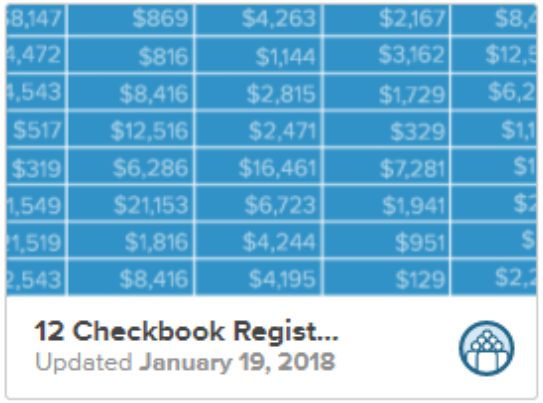
Leverage data from ERP & other systems

- Financial
- Operational

Started focusing here mid-2017



We currently have 55 unique OGI reports



Stories helps to bring it all together

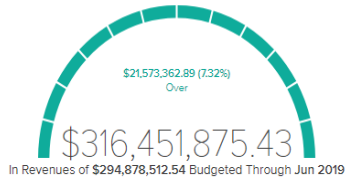
We currently have 61 stories

General Fund Revenues

1.0 General Fund Revenues (Qtrly)

General Fund revenues by source. Major sources of revenue come from Property and Gross Receipts Taxes. Other sources tax, fee, license, etc.

Updated 7 weeks ago



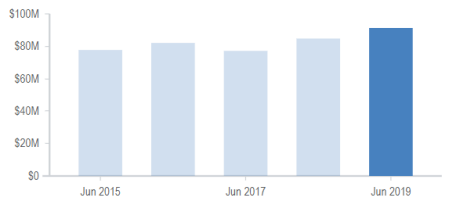
1.0 GF Revenue (Qtrly) – The County has collected $316.5 million in revenue which is 107.3% of the budgeted revenue for fiscal year 2019. It exceeded its budget by $21.6 million. The revenue increase is primarily due to gross receipts tax (GRT) collections and investment income cumulatively exceeding budget projections by $16.7 million. The growth can primarily be attributed to 1/16th Public Safety and 1/8th Hold Harmless Gross Receipts Taxes (GRTs) that were enacted in fiscal year 2018.

New Mexico Taxation and Revenue department distributes GRT revenues on a two-month lag basis, therefore fiscal year 2018 only reflects 10 months of these enactments compared to fiscal year 2019 which has 12 months of GRT distribution.

Health & Public Safety Division Expenses

2.5 Health & Public Safety Division Expenses GF (Yrly)

Quarter-to-date yearly view of actual expenditures for the division.



$91,158,846.42

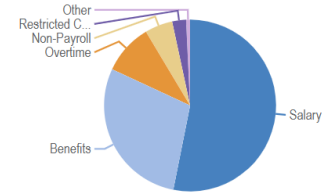
in Expenses in Jun 2019

2.5 Health & Public Safety Division Expenses GF (Yrly) – Health and public safety expenditures totaled $91.2 million, $74. 6 million or 81.9% was for salary and benefits. Overtime was $8.7 million or 9.5% of the division expenditures. Non-payroll which includes projects and contractual services makes up $4.8 million or 5.2% while restricted costs such as, law enforcement insurance and insurance deductibles make up $2.4 million or 2.61% of expenditures. The remaining $700 thousand or 0.7% of expenses for the division is made up from direct asset purchases and travel and training. Health and public safety ended the fiscal year $6.6 million, or 7.9% more than fiscal year 2018. There were several factors that increased their expenditures this fiscal year.

Health & Public Safety Division Salary vs. Operating Expenses

Public Safety Division Salary vs. Operating Expenses

Quarter-to-date yearly view of salary vs. operating expenses for the division.



$91,158,846.42

in Expenses in Jun 2019

The main drivers are fire and rescue salary and benefits increased approximately $800 thousand over fiscal year 2019 mainly attributed to increased firefighter count, increased salaries and regular overtime, as well as a $300 thousand purchase of SCBA air-packs. Youth Services Center (YSC) sustained a $387 thousand increase to meal supplies, law enforcement insurance premiums as well as one-time office expenses. Animal care Services payroll increased over $1.1 million with the addition of new facility staffing. The Sheriff's office payroll increased by $3.4 million due to negotiated pay raises and 9 new deputies and a Sergeant being added. Emergency management and emergency communications had little change in comparison.

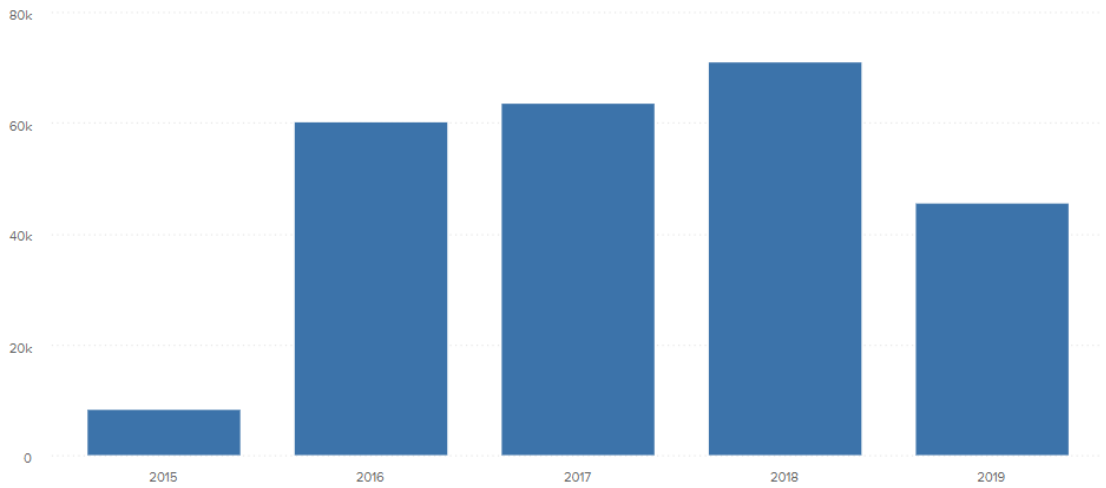
Dashboards in Performance Platform

We currently have 30 operational dashboards + 34 department performance dashboards

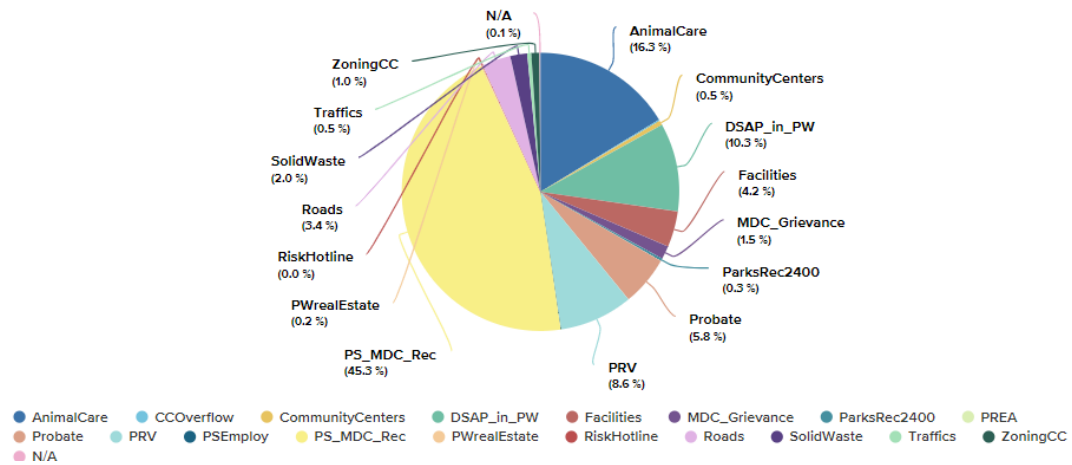
Constituent & Support Services Contact Center Operational Dashboard

Bernalillo County's Contact Center is your one-stop connection for everything BernCo. We serve as a single point of entry for information, and resolution of service requests. From internal facility requests to road reports, animal concerns to inmate information, we are here to deliver information and resources to you. We serve constituents and our county colleagues with passion and compassion, helping you navigate your way through county services and resources.

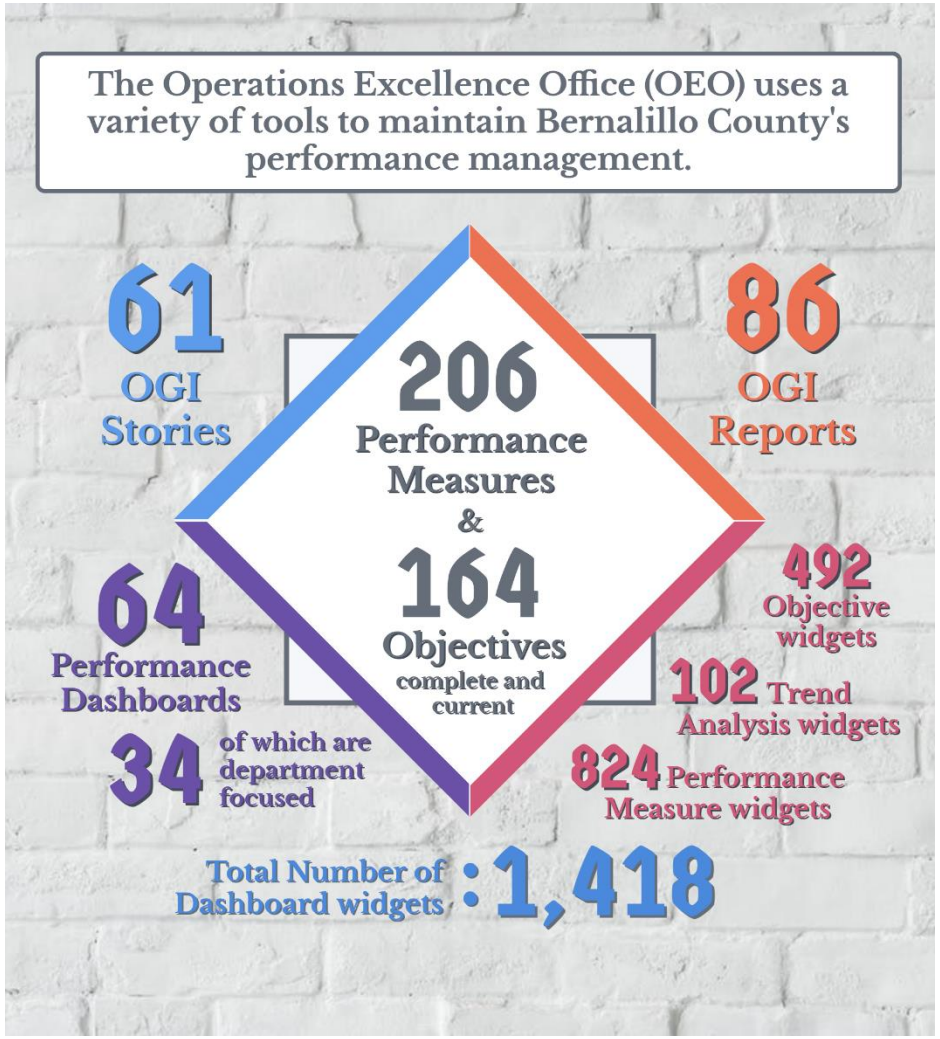
CC1 - Total Incoming Calls from Jan 2017 to Jul 2019 (CSQ Detailed Call Report)



CC2 - Total Incoming Calls by Line of Business from Jan 2017 - Jul 2019 (CSQ Detailed Call Report)



Making lots of data manageable & understandable



Still evolving & growing

Data → Information → Knowledge → Analytics → Data Driven Decision Making

- Working towards data driven decision making
- Having the right tools & good process helps
- Focus first is on having depts. engaged in analytics & performance

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